



# **City of San Angelo**

## **REQUEST FOR PROPOSALS**

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**HR-02-20**  
**Human Resources Department**  
*Post 65 Retiree Benefits*

**SUBMITTAL DEADLINE: AUGUST 7, 2020 / 2:00 PM, LOCAL TIME**

CITY OF SAN ANGELO • PURCHASING DIVISION • 72 WEST COLLEGE AVENUE • SAN ANGELO, TEXAS 76903



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# 1. INVITATION

## 1.1 General

The City of San Angelo, Human Resources Department is accepting proposals for Post 65 Retiree Benefits.

## 1.2 Confidentiality

All submissions shall remain confidential. After award, submissions will be made available for public inspection. The City shall not be responsible for the confidentiality of any trade secrets or other information contained or disclosed in the proposal unless clearly identified as such.

## 1.3 Document Availability

Proposal Documents are available in the Purchasing Division or may be downloaded from the City's website at [www.cosatx.us/bids](http://www.cosatx.us/bids). To locate the documents on the website, go to:

**Bid Information > RFP: HR-02-20 / Post 65 Retiree Benefits**

## 1.4 Digital Format

If proposal specifications are obtained in digital format in order to prepare a response, the response must be submitted in hard copy according to the instructions contained in this proposal package. If, in its response, respondents make any changes whatsoever to the published proposal specifications, the proposal specification **as published** shall control. Furthermore, if an alteration of any kind to the proposal specification is discovered after the contract is executed and is or is not being performed; the contract is subject to immediate cancellation without recourse.

## 1.5 Insurance and Indemnification Requirements

Insurance and indemnification requirements applicable to this project are detailed within the Special Insurance Rider and/or the draft project agreement included with this solicitation package. Please review the insurance and indemnification requirements with your insurance agent prior to submission.

## 1.6 Interpretations

All questions about the meaning or intent of the contract documents, including specifications shall be submitted to the Purchasing Division via email [sapurch@cosatx.us](mailto:sapurch@cosatx.us) or in writing. Please include the RFP Number and Title in the subject line. Questions received after the deadline established for submitting questions/interpretations will not be answered.

Replies will be issued by addenda and posted on the City's website. Only questions answered by formal written addenda will be binding. Oral interpretations or clarifications will be without legal effect.

## 1.7 Required Response

The City requires a response to any Request for Proposal (RFP) notifications sent to potential vendors. Should a company choose not to participate, then in order to remain on the City of San Angelo's potential vendors list, a "No Bid Reply" form must be submitted.

## 1.8 Deadline and Delivery Location

Sealed RFP submittals must be received no later than **August 7, 2020 at 2:00 PM, Local Time**. The time recorded at [www.time.gov](http://www.time.gov) will serve as the official record of time. Proposals received after the bidding deadline, regardless of the mode of delivery, will not be considered.



**It is the sole responsibility of the vendor to ensure that the sealed RFP submittal arrives in the Purchasing Office by the specified deadline, regardless of the method chosen by the firm for delivery.**

**Faxed or electronically submitted proposals will not be accepted.**

#### **1.9 Copies**

Submit: One (1) unbound original (binder clips are acceptable), three (3) bound copies (binders, staples or binder clips are acceptable), and one (1) copy in PDF format on USB Flash Drive of entire submission including required RFP forms. **Please clearly indicate which is the original copy.**

#### **1.10 Delivery Address**

City of San Angelo  
Purchasing Division, RFP: HR-02-20  
72 West College Avenue, Suite 310  
San Angelo, Texas 76903

**Mark Sealed Envelope: RFP: HR-02-20 / Post 65 Retiree Benefits**

#### **1.11 Addenda**

Should specifications be revised prior to the deadline for submittals, the City's Purchasing Division will issue addenda addressing the nature of the change and post them on the City's website. Respondents should **acknowledge any addenda and return the form with their proposal package**. Respondent is responsible for checking the City's website to determine if any addenda have been issued prior to submitting a proposal. Failure to consider all addenda will be at the respondent's risk.

#### **1.12 Award of Contract**

The City reserves the right to accept or reject any or all proposals, and to waive any informalities or irregularities in the RFP process. The City is an equal opportunity employer.

The City will select the most highly qualified respondent(s) of the requested services based on all evaluation factors and then attempt to negotiate a contract.

#### **1.13 Acceptance of Proposal Content**

Before submitting a proposal, each respondent shall make all investigations and examinations necessary to ascertain all conditions and requirements affecting the performance of the contract and to verify any representations made by the City upon which the proposal will rely. If the respondent receives an offer because of its proposal, failure to have made such investigation and examinations will in no way relieve the respondent from its obligation to comply in every detail with all provisions and requirements.

#### **1.14 Equal Employment Opportunity**

Attention of respondents to the requirement for ensuring that employees and applicants for employment are not discriminated against because of their race, color religion, sex, national origin, age, or disability.

#### **1.15 Proposal Term**

The initial term of agreement for all products will be for a one (1) year period beginning January 1, 2021, with four (4) optional one (1) year extensions thereafter.

The respondent must notify the City ninety (90) days prior to the end of each term as to their intention to terminate the contract. Terms will renew automatically unless ninety (90) days written notice is given for termination.



CITY OF SAN ANGELO, TEXAS  
PURCHASING DIVISION  
72 West College Avenue, San Angelo, Texas 76903  
325.657.4219 • sapurch@cosatx.us

## 1.16 Points of Contact

### *During RFP*

**Nolan Sosa, Manager**  
Purchasing Division  
City of San Angelo  
72 W. College Ave.  
San Angelo, Texas 76903  
sapurch@cosatx.us  
(325) 657-4219

### *Contract Manager After Award*

**Christine Russell, Coordinator**  
Human Resources Department  
City of San Angelo  
72 W. College Ave.  
San Angelo, Texas 76905



## 2. INSTRUCTIONS TO RESPONDENTS

### 2.1 Corrections, Additions, or Deletions

Corrections, additions, or deletions to any portion of the invitation will be in the form of written addenda.

### 2.2 Examinations of RFP Documents

Respondents are expected to examine all specifications, drawings, standard provisions, and instructions. Failure to do so will be at the respondent's risk.

### 2.3 Taxes

All quotations are to be submitted less Federal Excise and State of Texas Sales Taxes. Tax exemption certificates will be provided upon request.

### 2.4 Authorized Signature

Proposals must show vendor name, address, and be manually signed. The originals must include the copy with the manual signatures. The person signing the proposal must have authority to bind their firm in a contract. Any erasures or other changes must be initialed by the person signing the proposal.

### 2.5 Modification or Withdrawal of Proposals

Proposals **CANNOT** be altered or amended after the closing time. Proposals may be modified or withdrawn prior to the closing hour and date by written notice to the Purchasing Division. A proposal may also be withdrawn in person by a respondent or their authorized agent, provided their identity is made known and they sign a receipt for the proposal. No proposal may be withdrawn after the closing time and date without acceptable reason in writing and with approval of the Purchasing Division.

### 2.6 Restrictions on Communication

Respondents shall not communicate with: 1) elected City officials, City staff, or contracted agents of the City regarding the RFP from the time the RFP has been released until the contract is posted as a City Council agenda item; and 2) City officials/employees/agents from the time the RFP has been released until the contract is awarded. These restrictions extend to "thank you" letters, phone calls, emails and any contact that results in the direct or indirect discussion of the RFP and/or proposal submitted by respondent. Violation of this provision by respondent and/or its agent may lead to disqualification of respondent's proposal from consideration and from opportunities to bid on future projects.

Exceptions to the Restrictions on Communication with City employees include:

1. Private (non-business) contacts with the City by the respondent's employees acting in their personal capacity.
2. Casual social contacts that do not include mention of the RFP.
3. Respondents may submit written questions concerning this RFP to the email listed below before July 24, 2020. Questions received after the stated deadline will not be answered. Submission of questions to any other party prior to award may result in the disqualification of a respondent from bidding on this project as well as future projects for the City.

It is required that all questions be sent by email to [sapurch@cosatx.us](mailto:sapurch@cosatx.us). **Please ensure the RFP Number and Title is in the Subject Line.** Questions submitted and the City's responses will be published in the form of addenda to the City's website at <https://www.cosatx.us/bids>. Respondent is responsible for calling the City or reviewing the website to determine if any addenda have been issued prior to their submittal. Only questions answered by formal addenda will be binding.

1. Respondents may provide responses to questions asked of them after responses are received and opened. During interviews, if any, verbal questions and explanations will be permitted. If interviews are conducted, respondents shall not bring lobbyists. All cost associated with interviews will be at the respondents' expense. The City reserves the right to exclude any persons from interviews as it deems in its best interests.



2. Upon completion of the evaluation process, respondents shall receive a notification letter indicating the recommended firm and anticipated City Council agenda date. Respondents desiring a review of the solicitation process must submit a written request no later than five (5) calendar days from the date the letter was sent. Failure to submit a letter in writing to the Purchasing office prior to the end of the fifth day shall be at the risk of the respondent. The letter will indicate the name and address for submission of requests for review.

City reserves the right to contact any respondent to negotiate if such is deemed desirable by City. Such negotiations initiated by City staff persons shall not be considered a violation by respondent of this section.

## **2.7 Disqualification**

The respondent may be disqualified for any of the following reasons:

- A. The respondent is involved in any litigation against the City of San Angelo.
- B. The respondent is in arrears on any existing contract or has defaulted on a previous contract with the City.
- C. The response is deemed non-conformant/non-responsive to the criteria/instructions highlighted herein.
- D. The respondent is debarred, suspended, terminated, or otherwise excluded from or ineligible covered transactions by any federal, state, or local government entity or agency.
- E. The proposal is not received by the proposal submittal deadline; or,
- F. The proposal is not executed by a person authorized to enter into a contract binding on the respondent.

## **2.8 Reservations**

The City expressly reserves the right to accept, reject, or cancel all proposals AND:

- A. Waive any defect, irregularity, or informality in any proposal or bidding procedure.
- B. Extend the proposal closing time and date.
- C. Reissue a bid invitation or RFP.
- D. Procure any item by other means; or,
- E. Increase or decrease the quantity specified, unless the vendor specifies otherwise.

## **2.9 Acceptance**

Acceptance of respondent's qualifications will be in the form of a purchase order and contract. Notice for annual contract agreements will be a notice of award, purchase order, or contract.

## **2.10 Order Placement**

*No work shall be ordered without a Purchase Order and all invoices must reference the Purchase Order number.* City's obligation is payable only and solely from funds available for the purpose of this purchase. Lack of funds shall render this contract null and void to the extent funds are not available and any delivered but unpaid for goods will be returned to vendor by City. Accepting orders without a Purchase Order number shall be at the risk of the vendor.

## **2.11 Invoices and Payment**

Contractor will submit itemized invoices for all services rendered pursuant to this Request for Proposals. Invoices will bear the name of the firm and will be addressed to the appropriate City Point of Contact, Contract Number (HR-02-20), and Purchase Order number. Invoices will be in itemized format and provide sufficient detail that demonstrates work performed.

Payment may be withheld by City, at the discretion of the City, to vendor until all required documents pertaining to the incurred charges are provided to the authorized City representative.





## **2.12 Gratuities**

The City may, by written notice to the vendor, cancel this contract without liability to vendor if it is determined by the City that gratuities were offered from an agent or representative of the vendor to any officer or employee of the City with a view toward securing a contract or securing favorable treatment with respect to the awarding or amending, or the making of any determinations in respect to the performing of such contract. In the event this contract is canceled by City, remedies to recover or withhold the amount of the cost shall be incurred by vendor in providing such gratuities.

## **2.13 Termination**

Performance under this contract may be terminated in whole, or in part by the City in accordance with this provision. Termination performance hereunder shall be affected by the delivery to vendor of a "Notice of Termination" specifying the extent to which performance under this contract is terminated and the date upon which such termination becomes effective.

## **2.14 Force Majeure**

Neither party shall be held responsible for losses resulting if the fulfillment of any terms or provisions of this contract is delayed or prevented by any cause not within the control of the party whose performance is interfered with, which by the exercise of reasonable diligence said party is unable to prevent.

## **2.15 Assignment – Delegation**

No right or interest in the contract shall be assigned nor shall any delegation of any obligation made by vendor be valid without the written permission of the City. Any attempted assignment or delegation by vendor shall be wholly void and totally ineffective for all purposes unless made in conformity with this paragraph.

## **2.16 Waiver**

No claim or right arising out of a breach of this contract can be discharged in whole or in part by a waiver or renunciation of the claim or right unless the waiver or renunciation is supported by consideration and is in writing signed by the aggrieved party.

## **2.17 Modifications**

This contract can be modified or rescinded only in writing signed by both of the parties or their duly authorized agents.

## **2.18 Interpretation – Parol Evidence**

This writing is intended by the parties as a final expression of their agreement and is intended as a complete agreement for dealings between the parties and no usage of the trade shall be relevant to supplement or explain any term used in this agreement. Acceptance or acquiescence in a course of performance rendered under this agreement shall not be relevant to determine the meaning of this agreement even though the accepting or acquiescing party has knowledge of the performance and opportunity for objection. Whenever a term defined by the Uniform Commercial Code is used in the agreement, the definition contained in the Code is to control.

## **2.19 Applicable Law**

This agreement is subject to all applicable federal and state laws, statutes, codes, rules and regulations, and local ordinances, rules and regulations. This agreement is also subject to the Uniform Commercial Code. Whenever the term "Uniform Commercial Code" is used, it shall be construed as meaning the Uniform Commercial Code as adopted in the State of Texas as effective and in force on the date of this agreement.

## **2.20 Advertising**

Vendor shall not advertise or publish, without City's prior consent, the fact that City has entered into this contract, except to the extent necessary to comply with proper requests for information from an authorized representative of the federal, state, or local government.



## 2.21 Right to Assurance

Whenever one party to this contract in good faith has reason to question the other party's intent to perform, they may demand that the other party give written assurance of its intent to perform. If a demand is made, and no assurance is given within five (5) days, the demanding party may treat this failure as an anticipatory repudiation of the contract.

## 2.22 Equal Employment Opportunity

Vendor agrees that during the performance of its contract it will:

- Treat all applicants and employees without discrimination as to race, color, religion, sex, national origin, marital status, age, or handicap.
- Identify itself as an Equal Opportunity Employer in all help wanted advertising or request. The vendor shall be advised of any complaints filed with the City alleging that vendor is not an Equal Opportunity Employer. The City reserves the right to consider its reports from its human relations administrator in response to such complaints in determining whether or not to terminate any portion of this contract for which Purchase Orders or authorities to deliver have not been included; however, the vendor is specifically advised that no Equal Opportunity Employment complaint will be the basis for cancellation of this contract for which a Purchase Order has been issued or authority to deliver granted.

All vendors must be Equal Opportunity Employers. Disadvantaged and minority vendors are encouraged to participate.

## 2.23 Conflict of Interest

Vendor agrees to comply with the conflict of interest provisions of the City of San Angelo Charter and Code of Ordinances. Vendor agrees to maintain current, updated disclosure of information on file with the City Clerk throughout the term of the contract.

Chapter 176 of the Texas Local Government Code requires a vendor who enters or seeks to enter into a contract for the sale or purchase of real property, goods, or services with a local governmental entity or local government officer thereof to file a conflict of interests' disclosure questionnaire with the governmental entity prescribed.

**A Conflict of Interest Questionnaire Form (CIQ) – included in the bid forms - must be submitted no later than the seventh (7th) business day after the date the vendor begins discussion, negotiation, applies or responds to a request for proposal or bids, or correspondence in writing related to a potential contract with the local governmental entity.**

## 2.24 Certificate of Interested Parties (Form 1295)

In 2015, the Texas Legislature adopted [House Bill 1295](#), which added section 2252.908 of the Government Code. The law states that a governmental entity or state agency may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The law applies only to a contract of a governmental entity or state agency that either (1) requires an action or vote by the governing body of the entity or agency before the contract may be signed or (2) has a value of at least \$1 million. The disclosure requirement applies to a contract entered on or after January 1, 2016.

### Filing Process:

On January 1, 2016, the ethics commission made available on its website a new filing application that must be used to file Form 1295. A business entity must use the application to enter the required information on Form 1295 and print a copy of the completed form, which will include a certification of filing that will contain a unique certification number. An authorized agent of the business entity must sign the printed copy of the form. The completed Form 1295 with the certification of filing must be filed with the governmental body or state agency with which the business entity is entering into the contract.

Information regarding how to use the filing application and the application are both available at [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm). Instructional videos are available under the heading Instructional Videos for Business Entities.



The Form 1295 must be received, signed and original, within thirty (30) days of Council award or the contract may be voided.

#### **2.25 Taxes and Permits**

Attention is directed to the requirements of the General Conditions regarding payment of taxes and obtaining permits. All taxes that are lawfully assessed against the City or the selected vendor in connection with the work shall be paid by the vendor. The bid prices shall include all such taxes and the costs of all required permits. The City is exempt from State Sales Tax and Federal Excise Tax.

#### **2.26 Examination of Contract Documents**

Each vendor shall thoroughly examine and be familiar with this document, specifications, etc. The submission of a bid shall constitute an acknowledgment that the vendor has thoroughly examined and is familiar with all solicitation and contract documents. The failure or neglect of a vendor to receive or examine any of the solicitation or contract documents shall in no way relieve them from any obligations with respect to their submission or to any resulting contract. No claim for extra or additional compensation will be allowed based upon a lack of knowledge of any contract document, and the City will in no case be responsible for any loss or for unanticipated costs that may be suffered by the selected vendor as a result of conditions pertaining to the work.

#### **2.27 Legal Venue**

Tom Green County, Texas

#### **2.28 Funds - Price**

Following negotiations, the vendor will establish a price agreement with the City. The work will be selected based on availability of funds.

#### **2.29 Time of Performance**

The time of performance is outlined in the attached draft contract agreement.



### 3. SCOPE OF SERVICES REQUESTED

#### 3.1 General

The City of San Angelo is seeking proposals from vendors for the following plans:

##### A. Post 65 Retiree Benefits

The initial term of agreement for all products will be for a one (1) year period beginning January 1, 2021, with four (4) optional one (1) year extensions thereafter.

#### 3.2 Organization Profile

San Angelo is the largest city in Tom Green County with a population of approximately 100,450, which provides for a Council-Manager form of government. The City's operations are located solely in the State of Texas. The City has fourteen (14) departments, fifty-three (53) divisions and employs a total of approximately 995 employees and an additional 12 employees who work for the Chamber of Commerce.

The City of San Angelo has retained the services of Holmes Murphy to assist them in analyzing vendor pricing, service, and capabilities for their Post 65 Retiree Benefits.

The City's current vendors are as indicated below:

- Post 65 Retiree Benefits - Aetna Medicare Advantage

A summary of the benefits and eligibility provisions are included in this RFP.

The City has been working diligently to come up with solutions to increase the overall health of its employees. The City has been using San Angelo Community Medical Center as its wellness program provider.

#### 3.3 Eligibility

All full-time employees, qualified part-time employees, qualified retirees, qualified widows and Chamber of Commerce employees are eligible to participate in the City's benefits plan. All of their eligible dependents are allowed to elect health, prescription drug benefits, dental and vision coverage, provided the covered member has also elected those coverages. Health, prescription drug benefits, dental and vision are available for COBRA continuation.

#### 3.4 Scope of Work

The City shall require that the vendor provide all necessary services including, but not limited to the following:

1. Maintain a fully automated claims adjudication system in compliance with electronic transmission standards and security requirements and all other regulations as required by HIPAA, provide web access to plan participants that allows for claim status and offers various customer service functions.
2. Maintain records and management reports, including claims and accounting information as required by the contract.
3. Provide timely response to inquiries from plan participants and providers regarding eligibility and status of claim, correspondence, payment, and any other information requested by such parties in a manner that will limit the City's involvement in day-to-day inquiries.
4. Prepare and review with the Human Resources staff, and print summary plan documents, claim forms, and any other communication material as required by the contract.
5. If vendor uses ID cards, the City prefers vendor to mail identification cards to the participant's home address.
6. Deliver utilization reports. The City and its consultants need to be able to access standard reports online, preferably in excel format.



7. Provide online access to additional standard or ad hoc reports as needed by the City. If a specific report cannot be generated online, prepare and provide such to the City electronically.
8. Meet with representatives of the City's Human Resources Department as often as deemed necessary by City.

### **3.5 Commissions/Broker of Record**

Please do not include commissions in your proposal. Holmes Murphy is the consultant/broker of record for the City.

### **3.6 Anticipated Timeline of Events**

RFP Release Date	July 13, 2020
Deadline for Questions	July 24, 2020, 5:00 PM (CST)
Proposals Due Date	August 7, 2020, 2:00 PM (CST)
Finalist/BAFO Presentations (as needed)	August 2020
City Council Consideration	September 2020
Effective Date	January 1, 2021



## 4. RFP SUBMISSION FORMAT

Qualifications shall be submitted in the following format with each element requested and/or form furnished as specified to facilitate evaluation of the proposals. The detailed requirements in this RFP are **mandatory**.

### **FAILURE TO ADHERE TO THE REQUIRED FORMAT MAY BE CAUSE FOR REJECTION OF PROPOSAL.**

To aid in the evaluation, all responses shall follow the same general format. Each section has a maximum page limit. Proposals shall not exceed forty (40) pages total (excluding required spreadsheets, required forms and/or supplemental information such as proof of insurance, letters delegating signatory authority, etc.).

#### **4.1 Cover Page**

Show the subject, the name of your firm, address, telephone number(s), name of contact person, and date. Clearly indicate "RFP: HR-02-20 Post 65 Retiree Benefits" on this page.

#### **4.2 Table of Contents**

Include a clear identification of services by section and by page number.

#### **4.3 Vendor Response Spreadsheets**

All vendors must complete the RFP spreadsheet in the excel format provided for each line of coverage requested and return in the response in hard copy and excel format.

#### **4.4 General Vendor Information**

All vendors must complete the Vendor Information spreadsheet in the excel format provided and return in the response in hard copy and excel format.

#### **4.5 Sample Reporting**

All vendors must provide report samples.

#### **4.6 Staff Qualifications and Organization Experience**

Please identify the key personnel that will be working on this project. Make sure to reference proposed staff members as they relate to qualification for specific disciplines/category. This section should include resumes and/or information to expound on the proposed staff experience and qualifications.

#### **4.7 Approach in Providing Services**

Based on the general requirements listed in this RFP document, please describe your overall approach and methodology for completing the services as requested.

#### **4.8 References**

Please provide information in this section on references for similar services you have provided for other municipalities or similar institutions. For this section, respondents must use the form titled "List of References" included in "Submission Forms." You may also include additional information to supplement the information included on the reference pages. Respondents who fail to submit references as part of their proposal will receive a score of 0 for that criteria during evaluation. Failure to submit all required forms may also result in the rejection of a submission as non-conformant with the RFP instructions.

#### **4.9 Additional Service Offerings**

Provide any additional information considered essential to this proposal and all other required forms.

#### **4.10 Required Forms**

Complete all required forms specified in Section "Required Submission Forms." Note that failure/refusal to adhere to the requirements in Section "Required Submission Forms" may result in the rejection of your submission as non-conformant.



## 5. SELECTION PROCESS

A selection committee will evaluate and rank the proposals in relation to the published selection criteria within 60 days after the opening.

The City's process is as follows:

1. The City will evaluate and rank the proposals in relation to the published selection criteria within sixty (60) days after the opening.
2. The City reserves the right to revise the proposal and then request "Best and Final Offers" from the top candidates following the initial evaluation.
3. The City will then select the proposal that offers the best value based on the published selection criteria and its ranking evaluation.
4. Following the selection process, the contract negotiation process begins, and the City will negotiate first with the highest ranked offer. At this stage, the City may discuss modifications to the proposed scope, time and price. Modifications are not required. If modifications are discussed but not mutually agreed upon, a final contract may still be negotiated and mutually agreed upon based on the original response to the RFP. If the two parties are unable to reach a final agreement, the City will notify that respondent in writing that formal negotiations are ended.
5. The City may then negotiate with the next ranked respondent. This process continues in the order of the selection ranking until a final contract is reached or all proposals are rejected.
6. The City reserves the right to reject all proposals and procure goods/services through alternative means.

The proposals will be evaluated based on the criteria and weighting detailed below:

### Medical/Pharmacy

Medical/Pharmacy Plan Scoring Criteria	Points
Plan Design and Administration Services*	40
Fees, Renewals, and Guarantees	30
Network and Disruption	15
References	10
Adherence to the Terms and Conditions of RFP	5
<b>Total Available Points</b>	<b>100</b>

\* Vendors are encouraged to partner and respond to the RFP with a concierge service which will assist staff and members with benefit questions.



CITY OF SAN ANGELO, TEXAS  
PURCHASING DIVISION  
72 West College Avenue, San Angelo, Texas 76903  
325.657.4219 • sapurch@cosatx.us

## 6. ATTACHMENTS

- A. City of San Angelo Standard Performance Contract Terms (effective April 16, 2018)





## 7. NO BID REPLY

### FOR RFP: HR-02-20 / POST 65 RETIREE BENEFITS

If for any reason, you **are not** submitting a bid/bid, please check one or more reasons below and return the form to us either by mail or by email to [sapurch@cosatx.us](mailto:sapurch@cosatx.us) in order to remain in our database for these types of products or services.

By providing us this information, we hope to improve future request packages that will elicit your participation.

WE WISH TO \_\_\_\_ THE LIST OF VENDORS FOR THE CITY OF SAN ANGELO:

- ☐ **Remain On**  
☐ **Be Deleted From**

WE HEREBY SUBMIT A "NO BID" BECAUSE:

- ☐ We are not interested in selling through the bid process.  
☐ We are unable to prepare the bid form in time to meet the due date.  
☐ We do not wish to bid under the terms and conditions of the Request for Bid/Bid.  
☐ We do not feel we can be competitive.  
☐ We cannot submit a bid because of the marketing or franchising policies of the manufacturing company.  
☐ We do not wish to sell to the City of San Angelo.  
☐ We do not sell the items or provide the services requested.  
☐ Other: \_\_\_\_\_

FEEDBACK/OBJECTIONS: \_\_\_\_\_

**AUTHORIZED AGENT • PLEASE PRINT**

<b>COMPANY</b>	
<b>NAME</b>	<b>TITLE</b>
<b>SIGNATURE</b>	<b>DATE</b>

THANK YOU FOR YOUR ASSISTANCE!



## 8. REQUIRED SUBMISSION FORMS

### Submit all the following:

- One (1) unbound original (binder clips are acceptable)  
**Please clearly indicate the original as such.**
- Three (3) bound copies (binders, staples or binder clips are acceptable)
- One (1) copy in PDF format on USB Flash Drive of submission including all required RFP forms.

**Failure to submit required forms may result in the rejection of your submission.**

### Please submit all forms in the following order:

- ☐ Response to RFP: HR-02-20 Post 65 Retiree Benefits
- ☐ Contact Information Form
- ☐ IRS Form W-9
- ☐ Addenda Acknowledgment Form
- ☐ Disclosure of Certain Relationships Form
- ☐ Conflict of Interest Questionnaire
- ☐ Debarment and Suspension Certification
- ☐ Local Preference Consideration Application & Economic Impact Details
- ☐ Vendor Compliance with Reciprocity on Non-Resident Vendors
- ☐ List of References
- ☐ Special Insurance Rider
- ☐ Certificate of Insurance (ACCORD 25 FORM)
- ☐ Verification Relating to Prohibited Contracts – Israel
- ☐ Certification for Contracts, Grants, Loans, and Cooperative Agreements
- ☐ Draft Contract Cover and Contract

### 1295 Form Requirement

After Council award, one original of the Texas Ethics Commission Interested Parties Disclosure Form 1295 completed online at [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm) will be required within thirty (30) days following the date of Council action. Failure to submit the original Form 1295 to Purchasing within the prescribed time limit may result in loss of contract(s).

### Anti-Lobbying Agreement

In submitting its proposal, respondent certifies that it has not lobbied the City or its officials, managers, employees, consultants, or contractors in such a manner as to influence or to attempt to influence the bidding process. In the event it reasonably appears that the respondent influenced or attempted to influence the bidding process, the City may, in its discretion, reject the proposal.

**SUBMIT ALL FORMS BEYOND THIS POINT**



## Contact Information

### AUTHORIZED AGENT • PLEASE PRINT

An Authorized Agent for an entity pursuant to this solicitation is an individual duly authorized by the entity and having full capacity to bind the entity. Authorized Agent may include an Officer of a corporation, a General Partner of a partnership, a Managing Member of a limited liability company, or any other individual who has been granted such authority in writing executed by an individual having authority to bind the entity. City reserves the right to require written verification of an individual's authority to act on behalf of an entity.

NAME	
TITLE	E-MAIL
SIGNATURE	DATE

### PRIMARY CONTACT • PLEASE PRINT

Complete if different from above.

NAME	
TITLE	E-MAIL
SIGNATURE	DATE

### VENDOR DETAILS • PLEASE PRINT

VENDOR NAME	
PHONE	FAX
WEBSITE	
MAILING ADDRESS	
CITY / STATE / ZIP	
PHYSICAL ADDRESS (NO PO BOXES)	
CITY / STATE / ZIP	

☐ ATTACH IRS FORM W-9



## Addenda Acknowledgement

Receipt is hereby acknowledged of the following addenda to the Contract documents.

ADDENDUM NO. 1 DATED	_____	RECEIVED	_____
ADDENDUM NO. 2 DATED	_____	RECEIVED	_____
ADDENDUM NO. 3 DATED	_____	RECEIVED	_____

### AUTHORIZED AGENT • PLEASE PRINT

COMPANY NAME	ADDRESS
CITY/STATE	ZIP
NAME	TITLE
SIGNATURE	DATE



## Disclosure of Certain Relationships

### NOTICE TO VENDORS

**Effective January 1, 2006**, Chapter 176 of the Texas Local Government Code requires that any vendor or person considering doing business with a local governmental entity make certain disclosures concerning any affiliation or business relationship that might cause a conflict of interest with the local governmental entity. The provisions of Chapter 176 and the Form CIQ questionnaire that you must complete, if applicable, to comply with this new law, are available and explained in more detail at the Texas Ethics Commission website at [https://www.ethics.state.tx.us/filinginfo/conflict\\_forms.htm](https://www.ethics.state.tx.us/filinginfo/conflict_forms.htm).

A current list of City of San Angelo and City of San Angelo Development Corporation officers is available in the office of the City of San Angelo City Clerk, Room 201 of City Hall or on the City's website at <http://cosatx.us>. If you are considering doing business with the City of San Angelo or the City of San Angelo Development Corporation and have an affiliation or business relationship that requires you to submit a completed Form CIQ, it must be filed with the records administrator (City Clerk) of the City of San Angelo not later than the 7<sup>th</sup> business day after the date you become aware of facts that require the form to be filed. See Section 176.006, Texas Local Government Code. It is a Class C misdemeanor to violate this provision.

By submitting a response to a City of San Angelo or City of San Angelo Development Corporation Request for Bid proposals, Request for Bids, or Request for Qualifications or by conducting business with either of those two entities, you are representing that you are in compliance with the requirements of Chapter 176 of the Texas Local Government Code.

Nolan A. Sosa  
Purchasing Manager

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### LOCAL GOVERNMENT OFFICERS OF THE CITY OF SAN ANGELO

Local Government Officers of the City of San Angelo as defined by Chapter 176 of the Texas Local Government Code (Revised 03/10/2020)

For purposes of completion of the required Conflict of Interest Questionnaire for the City of San Angelo (required by all buyers who submit bids/proposals), Local Government Officers are:

**City of San Angelo City Council:**

Mayor: Brenda Gunter, Mayor

**Councilmembers:**

Tommy Hiebert, SMD 1  
Tom Thompson, SMD 2  
Harry Thomas, SMD 3 (Mayor Pro Tempore)  
Lucy Gonzales, SMD 4  
Lane Carter, SMD5  
Billie DeWitt, SMD 6

City Manager: Daniel Valenzuela

**Development Corporation Officers:**

Todd R. Kolls, President  
Bill Dendle, First Vice President  
David Cummings, Second Vice President  
Edward Carrasco, Director  
Garland Freeze, Director  
Max Puello, Director

Executive Director: Guy Andrews



## Conflict of Interest Questionnaire Instructions

### CONFLICT OF INTEREST QUESTIONNAIRE For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

**Local Government Code § 176.001(1-a):** "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

**Local Government Code § 176.003(a)(2)(A) and (B):**

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

\*\*\*

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;

or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.

**Local Government Code § 176.006(a) and (a-1)**

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.





## Conflict of Interest Questionnaire

CONFLICT OF INTEREST QUESTIONNAIRE For vendor doing business with local governmental entity		FORM CIQ
<p>This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.</p> <p>This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).</p> <p>By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.</p> <p>A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.</p>		<b>OFFICE USE ONLY</b>  Date Received
<b>1</b> Name of vendor who has a business relationship with local governmental entity.		
<b>2</b> <input type="checkbox"/> Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)		
<b>3</b> Name of local government officer about whom the information is being disclosed.  _____ Name of Officer		
<b>4</b> Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.  <p>A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?</p> <p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p> <p>B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?</p> <p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p>		
<b>5</b> Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.		
<b>6</b> <input type="checkbox"/> Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).		
<b>7</b> _____ Signature of vendor doing business with the governmental entity      _____ Date		

**PLEASE NOTE: If you do not have any Conflict of Interest(s) to report, please write "N/A" in Box 1 and complete Box 7 with signature and date.**



## Debarment and Suspension Certification Instructions

1. By signing and submitting this proposal, the prospective vendor is providing the certification set out below.
2. The inability of a person to provide the certification required below will not necessarily result in denial of participation in this covered transaction. The prospective vendor shall submit an explanation of why it cannot provide the certification set out below. The certification or explanation will be considered in connection with the determination whether to enter into this transaction. However, failure of the prospective vendors to furnish a certification or an explanation shall disqualify such person from participation in this transaction.
3. The certification in this clause is a material representation of fact upon which reliance was placed when the City of San Angelo determined to enter into this transaction. If it is later determined that the prospective vendor knowingly rendered an erroneous certification, in addition to other remedies available, the City of San Angelo may terminate this transaction for cause.
4. The prospective vendor shall provide immediate written notice to the City of San Angelo to which this proposal is submitted if at any time the prospective vendor learns that its certification was erroneous when submitted or has become erroneous because of changed circumstances.
5. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "vendor," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549(13 CFR Part 145). You may contact the City of San Angelo for assistance in obtaining a copy of these regulations.
6. The prospective vendor agrees by submitting this proposal that, should the proposed transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the City of San Angelo.
7. The prospective vendor further agrees by submitting this proposal that it will include the clause titled "Certification Regarding Debarment and Suspension" provided by the City of San Angelo, without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
8. A vendor in a covered transaction may rely upon a certification of a prospective vendor in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A vendor may decide the method and frequency by which it determines the ineligibility of its principals. Each vendor may, but is not required to, check the Non-procurement List.
9. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a vendor is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
10. Except for transactions authorized under paragraph 6 of these instructions, if a vendor in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the City of San Angelo, the City of San Angelo may terminate this transaction for cause.





## Debarment and Suspension Certification

- (1) The prospective primary vendor certifies to the best of its knowledge and belief that it and its principals:
- (a) Are not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
  - (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
  - (d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default.
- (2) Where the prospective primary vendor is unable to certify to any of the statements in this certification, such prospective primary vendor shall attach an explanation to their submission.

### AUTHORIZED AGENT • PLEASE PRINT

VENDOR	
NAME	TITLE
SIGNATURE	DATE



## Local Preference Consideration Instructions

Section 271.9051 of the Texas Local Government Code "CONSIDERATION OF LOCATION OF RESPONDENTS PRINCIPAL PLACE OF BUSINESS":

In accordance with Section 271.9051 of the Texas Local Government Code, if a local government receives one or more competitive sealed bids from a bidder whose principal place of business is in the municipality and whose bid is within five (5%) percent of the lowest bid price received from a bidder who is not a resident of the municipality, on contracts less than \$500,000 and three percent (3%) on contracts over \$500,000.00 the municipality may enter into a contract with (a) the lowest bidder or (b) the bidder whose principal place of business is in the municipality if the governing body of the local government determines, in writing, that the local bidder offers the local government the best combination of contract price and additional economic development opportunities for the local government created by the contract award, including the employment of residents of the local government and increased tax revenues to the local government.

Local Preference Consideration DOES NOT apply to Construction Projects over \$100,000 or Telecommunication and Information Technology Bids/Purchases.

**If you DO NOT have your principal place of business located within the City of San Angelo city limits – stop – do not fill out this form.**

**This "Application for Local Preference Consideration" does *not* mean that the City of San Angelo is limiting responses to this request for bids/proposals to only those businesses located within the city limits. All bids/proposals are welcome.**

Respondents who wish to qualify under the local preferences law must have their principal place of business located within the San Angelo city limits.

**If your principal place of business is within the San Angelo city limits and you want to apply for local preference consideration, then you must:**

1. Complete the **Local Preference Consideration Application**, and
2. ***Describe in writing and attach supporting documentation***, the additional economic development opportunities for the City of San Angelo that will be created if you are awarded this contract. Include the number of City of San Angelo residents that you will employ to complete this contract and the increased tax revenues that will be generated for the City of San Angelo if you are awarded this contract.



## Local Preference Consideration Application

Vendor Name: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

### Vendor Type:

- ☐ Corporation – Indicate state of incorporation \_\_\_\_\_
- ☐ Partnership – Indicate “general” or “limited” \_\_\_\_\_
- ☐ Sole proprietorship

### Attachments:

- ☐ **Describe in writing, and attach supporting documentation**, the additional economic development opportunities for the City of San Angelo that will be created if you are awarded this contract. Include the number of City of San Angelo residents that you will employ to complete this contract and the increased tax revenues that will be generated for the City of San Angelo if you are awarded this contract.

### Certification:

I hereby certify under penalty of perjury that the information which I have provided on this form is true and correct, that I am authorized to sign on behalf of the vendor set out above and if requested by the city will provide, within 10 days of notice, the necessary documents to substantiate the information provided.

### AUTHORIZED AGENT • PLEASE PRINT

VENDOR	
NAME	TITLE
SIGNATURE	DATE



## Vendor Compliance with Reciprocity on Non-Resident Vendors

Texas Government Code 2252.002 provides that, in order to be awarded a contract as low vendor, a non-resident vendor must bid projects for construction, improvements, supplies or services in Texas at an amount lower than the lowest Texas resident vendor by the same amount that a Texas resident vendor would be required to underbid a non-resident vendor in order to obtain a comparable contract in the state in which the non-resident's principal place of business is located.

A non-resident vendor is a contractor whose corporate offices or principal place of business is outside of the state of Texas. This requirement does not apply to a contract involving Federal funds. The appropriate blanks in Section A must be filled out by all out-of-state or non-resident vendors for your submission to meet specifications. The failure of out-of-state or non-resident contractors to do so will automatically disqualify that vendor. **Texas resident vendors must check the blank in Section B.**

### A. NON-RESIDENT (OUTSIDE OF TEXAS)

Non-resident Vendors in \_\_\_\_\_ (give state), our principal place of business, **are required** to be \_\_\_\_\_ percent lower than resident vendors by state law. A copy of the statute is attached.

Non-resident Vendors in \_\_\_\_\_ (give state), our principal place of business, **are not required** to underbid resident vendors.

### B. TEXAS RESIDENT

Our principal place of business or corporate offices are in the State of Texas: \_\_\_\_\_. (Mark a "check" in the blank if this applies.)

### AUTHORIZED AGENT • PLEASE PRINT

VENDOR NAME	ADDRESS
CITY/STATE	ZIP
NAME	TITLE
SIGNATURE	DATE



## List of References

List at least five (5) references of similar scope and size giving organization name, contact information, and term. Please include as many Local Area (City of San Angelo and the surrounding 150 miles) references as possible.

1	Government or Company Name	
	Location	
	Contact Person and Title	
	Telephone Number	
	Scope of Work	
	Contract Period	

2	Government or Company Name	
	Location	
	Contact Person and Title	
	Telephone Number	
	Scope of Work	
	Contract Period	

3	Government or Company Name	
	Location	
	Contact Person and Title	
	Telephone Number	
	Scope of Work	
	Contract Period	



<b>4</b>	Government or Company Name	
	Location	
	Contact Person and Title	
	Telephone Number	
	Scope of Work	
	Contract Period	

<b>5</b>	Government or Company Name	
	Location	
	Contact Person and Title	
	Telephone Number	
	Scope of Work	
	Contract Period	

<b>6</b>	Government or Company Name	
	Location	
	Contact Person and Title	
	Telephone Number	
	Scope of Work	
	Contract Period	



## Special Insurance Rider

The City of San Angelo requires contractors doing business with the City to provide and continuously maintain in effect at all times during the contract term insurance coverages as indicated on this Special Insurance Rider. Prior to commencement of Work, Contractor shall provide the City's Risk Management Office with a Certificate of Insurance on ACCORD 25 Form that confirms that Contractor has insurance coverages in compliance with the City's minimum insurance requirements set forth herein.

### ☒ Commercial General Liability

This policy shall be an occurrence-type policy and shall protect Provider and additional insureds against all claims arising from bodily injury, sickness, disease or death of any person (other than Provider's employees) and damage to property of City or others arising out of the act or omission of Provider or its agents and employees. This policy shall also include protection against claims for the contractual liability assumed by Provider under the paragraph of this Agreement entitled "Indemnification," including completed operations, products liability, contractual coverage, broad form property coverage, explosion, collapse, underground, premises/operations, and independent Vendors (to remain in force for two years after final payment). Coverage limits shall not be less than:

#### MINIMUM LIMIT(S):

\$1,000,000	Each Occurrence
\$1,000,000	Personal and Advertising Injury
\$2,000,000	General Aggregate
\$1,000,000	Products/Completed Operations Aggregate
\$100,000	Fire Damage

### ☒ Business Auto Liability

This policy shall be written in comprehensive form and shall protect Provider and the additional insureds against all claims for injuries to members of the public and damage to property of others arising from the use of motor vehicles and shall cover operation on and off the premises of all motor vehicles licensed for highway use, whether they are owned, non-owned or hired. Coverage shall be as follows:

#### MINIMUM LIMIT(S):

\$1,000,000	Each Accident Limit
-------------	---------------------

### ☒ Workers' Compensation and Employer's Liability

If Provider hires any employees, Provider shall maintain Workers' Compensation and Employer's Liability insurance, which shall protect Provider against all claims under applicable state workers' compensation laws and employer's liability. The insured shall also be protected against claim for injury, disease or death of employees which for any reason, may not fall within the provisions of a workers' compensation law. Coverage shall not be less than:

#### MINIMUM LIMIT(S):

\$500,000	Employer's Liability, Each Accident
\$500,000	Employer's Liability, Disease – Each Employee
\$500,000	Employer's Liability, Disease – Policy Limit

### ☒ Professional Liability

This insurance shall include contractual liability in its coverage, and the coverage under this policy shall survive the term of this Agreement as long as any liability could be asserted. Limit of liability per claim shall not be less than:

#### MINIMUM LIMIT(S):

\$2,000,000	Combined Single Limits
-------------	------------------------



## ☐ Environmental/Pollution Liability

This insurance shall include contractual liability in its coverage, and the coverage under this policy shall survive the term of this Agreement as long as any liability could be asserted. Limit of liability per claim shall not be less than:

### MINIMUM LIMIT(S):

\$2,000,000 Combined Single Limits

## ☐ Cyber Liability

This policy shall be an occurrence-type policy and shall protect provider and additional insured against all claims arising from cyber-attacks against the insured, members of the public, and the City. Coverage shall not be less than:

### MINIMUM LIMIT(S):

\$5,000,000	Privacy Notification and Crisis Management Expense
\$5,000,000	Information Security and Privacy Liability
\$5,000,000	Regulatory Defense and Penalties
\$5,000,000	Payment Card Industry Fines and Assessments
\$5,000,000	Website Media
\$5,000,000	Business Interruption
\$5,000,000	Extra Expense
\$5,000,000	Data Assets Coverage
\$5,000,000	Cyber-Extortion
\$5,000,000	Computer Fraud
\$5,000,000	Funds Transfer Fraud
\$5,000,000	Social Engineering/ Fraudulent Instruction Coverage

## ☐ Builder's Risk (All-Risk)

This insurance shall include contractual liability in its coverage, and the coverage under this policy shall survive the term of this Agreement as long as any liability could be asserted. Limit of liability per claim shall not be less than:

### MINIMUM LIMIT(S):

\$2,000,000 Combined Single Limits

## ☐ Liquor Liability





The certificate of insurance shall indicate that the City of San Angelo is provided by endorsement a Waiver of Subrogation in favor of the City on all policies.

All insurance policies required herein shall be drawn in the name of Contractor with the City of San Angelo as an additional insured to include its employees, agents, and Council persons by endorsement on all policies except workers compensation.

Upon request of the City of San Angelo, Contractor shall produce copies of insurance policies and/or endorsements that reflect the required insurance coverages and endorsements.

**Certificate Holder:**

**City of San Angelo, Texas  
72 W. College Avenue  
San Angelo, Texas 76903**

Written contracts will contain more detailed information regarding insurance requirements.

**Bonds are required for contracts that meet the following guidelines:**

- ☐ Contract in excess of \$100,000 requires a Performance Bond
- ☐ Contract in excess of \$50,000 requires a Payment Bond

The Bond must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56th Legislature, Regular Session, 1959 (Article 7.19-1, Vernon's Texas Insurance Code) per Texas Government Code Sec. 2253.021 and must be payable to the City of San Angelo, Texas.

Please provide your agent or broker with a copy of these requirements.

If you have any questions concerning compliance with the City's minimum insurance requirements, please call the Risk Management Division at 325-657-4359.

Contractor agrees to comply with City of San Angelo Special Insurance Rider requirements.

**CONTRACTOR**

**AUTHORIZED AGENT • PLEASE PRINT**

<b>VENDOR</b>	
<b>NAME</b>	<b>TITLE</b>
<b>SIGNATURE</b>	<b>DATE</b>



## Verification Relation to Prohibited Contracts – Israel

CITY OF SAN ANGELO, TEXAS, RFP HR-02-20

My name is \_\_\_\_\_ "Declarant";  
*FIRST MIDDLE LAST*

My date of birth is \_\_\_\_\_ ; and,  
*BIRTHDAY*

My address is \_\_\_\_\_ , \_\_\_\_\_ .  
*STREET CITY STATE*  
\_\_\_\_\_, and \_\_\_\_\_ .  
*ZIP CODE COUNTRY*

My position with \_\_\_\_\_ , contracting company, is \_\_\_\_\_ .  
*CONTRACTING COMPANY OFFICE HELD*

(1) The foregoing named contracting Company does not now and will not during the term of this contract, have contracts with or provide supplies or services to, an entity or company known to have contracts with or to provide supplies or services to a foreign terroristic organization or with an entity or company identified as providing such on a list prepared and maintained by the Texas Comptroller pursuant to Subchapter "F", Sections 2252.151 et. seq., Chapter 2252 "Contracts with Governmental Entity" of the Texas Government Code; neither is contracting Company identified as an entity providing such supplies or services on said list.

(2) The foregoing named contracting Company does not boycott Israel; and will not boycott Israel during the term of the contract with the City of San Angelo.

I declare under penalty of perjury that the foregoing is true and correct.

Executed in \_\_\_\_\_ County, State of \_\_\_\_\_ , on the  
*COUNTY OFFICE HELD*

\_\_\_\_\_ day of \_\_\_\_\_ , 20 \_\_\_\_\_  
*DAY MONTH YEAR*

\_\_\_\_\_  
*DECLARANT SIGNATURE*



## Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instruction.
3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Contractor, \_\_\_\_\_, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. Chap. 38, Administrative Remedies for False Claims and Statements, apply to this certification and disclosure, if any.

### CONTRACTOR

**AUTHORIZED AGENT • PLEASE PRINT**

<b>VENDOR</b>	
<b>NAME</b>	<b>TITLE</b>
<b>SIGNATURE</b>	<b>DATE</b>



## Draft Contract Cover Acknowledgement

Respondents shall submit copies of standard contract terms along with any and all terms and conditions applicable to the deliverance of goods/services resulting from this solicitation.

\_\_\_\_\_ I READ AND CAN COMPLY WITH ALL CONTRACT TERMS.

\_\_\_\_\_ I READ THE CONTRACT TERMS, REVISED THOSE I CANNOT COMPLY WITH, AND INCLUDED A REVISED COPY WITH MY SUBMISSION.

### AUTHORIZED AGENT • PLEASE PRINT

VENDOR	
NAME	TITLE
SIGNATURE	DATE



## Draft Contract Cover

CONTRACT # \_\_\_\_\_

RFP NO. HR-02-20 / POST 65 RETIREE BENEFITS

In consideration of the mutual covenants and promises herein contained, City of San Angelo and the below named Contractor agree as follows:

**CITY OF SAN ANGELO –** **Bryan Kendrick, Director**  
Department of Human Resources and Risk Management  
City of San Angelo  
72 W. College Ave.  
San Angelo, Texas 76905

**CONTRACTOR:** \_\_\_\_\_  
(If an entity other than individual, indicate whether Contractor is authorized by or registered as a foreign entity with the Texas Secretary of State to do business in Texas) **Yes** ☐ / **No** ☐

**Authorizing Officer/Agent:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_

### General Description of Project & Scope of Work:

The City of San Angelo Human Resources seeks responses to contract for services for Post 65 Retiree Benefits. For a proposal to be considered, the persons or organizations responding to this proposal (respondents) must demonstrate the capacity to perform the services described in the request for proposal.

**Effective Date:** This contract shall be effective from and after the First day of January, 2021.

**Date of City Council Authorization** \_\_\_\_\_, 2020

### Contract Time:

**X** The term of this contract shall be for a period of (1) One year, commencing on the "Effective Date" and automatically expiring on December 31, 2021, subject to extension as may be provided for in the contract documents.

**X** City shall have four (4) options to extend the term hereof for a period of one (1) year each, subject to availability and appropriation of funds. The respondent must notify the City ninety (90) days prior to the end of each term as to their intention to terminate the contract. Terms will renew automatically unless ninety (90) days written notice is given for termination.



**Davis-Bacon Act or Texas Prevailing Wage Rate, Texas Gov. Code, Chap. 2258:**

Davis-Bacon Act required payment of prevailing wages on federally funded or assisted construction projects.

☐ Applies / ☒ Does Not Apply to this contract.

**Texas Government Code Chapter 2258 Prevailing Wage Rates**

☐ Applies / ☒ Does Not Apply to this contract.

**Contract Price:** Notwithstanding anything to the contrary in the contract documents, compensation due and payable by the City under this Contract shall not exceed;

☐ Base Price \$ \_\_\_\_\_,

☒ Schedule of Rates and Charges

(Fee Schedule, Submitted by CONTRACTOR in response to RFP: HR-02-20, a copy of which is attached hereto and made a part hereof for all purposes),

☐ plus Alternate 1 \$ \_\_\_\_\_,

☐ plus Alternate 2 \$ \_\_\_\_\_,

☐ plus Alternate 3 \$ \_\_\_\_\_

for a total sum of \_\_\_\_\_ AND NO/100 DOLLARS (\$ \_\_\_\_\_), except upon Change Order authorized under this contract or written amendment executed by the authorized representatives of the parties pursuant to authority of their governing bodies.

**Contract Documents Adopted by Reference:** The parties to this Contract adopt in their entirety by reference thereto each of the following contract documents indicated by checkmark, as if each document were set forth herein word for word and in its entirety:

☒ RFP No. HR-02-20

☐ ADDENDUM 1 to bid dated \_\_\_\_\_, 20\_\_\_\_

☐ ADDENDUM 2 to bid dated \_\_\_\_\_, 20\_\_\_\_

☐ ADDENDUM 3 to bid dated \_\_\_\_\_, 20\_\_\_\_

☒ City of San Angelo Standard Performance Contract Terms (effective April 16, 2018) \*

☐ City of San Angelo Standard Professional Services Contract Terms (effective April 16, 2018) \*

☐ City of San Angelo Owner's General Construction Conditions (effective April 16, 2018) \*

☐ Plans: \_\_\_\_\_



*(Include engineering entity, date, part/phase and other identifying information)*

☐ Technical Specifications \_\_\_\_\_  
*(Include source, date, part/phase and other identifying information)*

☒ Contractor's Response to RFP No. HR-02-20

☒ Other: **Additional Document(s) Provided in Response to RFP: HR-02-20 (see "Required Forms")**

\* The terms and conditions in these referenced contract documents apply to the Contract to the exclusion of any other terms that the Contractor seeks to impose or incorporate, or which are implied by trade, custom, practice or course of dealing.

**Acknowledgement of Receipt of Contract Documents:**

The foregoing identified Contract Documents excluding Contractor's Response to this Request for Proposal (RFP) are posted on the City's website at <http://www.cosatx.us/departments-services/purchasing/bid-information>. Hard copies are available to the Contractor upon request addressed to the City of San Angelo, Purchasing Division, 72 W. College, San Angelo, Texas 76903; (325) 657-4219. BY THE EXECUTION HEREOF, CONTRACTOR REPRESENTS THAT CONTRACTOR HAS REVIEWED AND IS FAMILIAR WITH EACH OF THE CONTRACT DOCUMENTS, HAS SECURED HARD COPIES OF THE CONTRACT DOCUMENTS THAT CONTRACTOR DESIRES TO ACQUIRE, AND AGREES THAT IT IS THE INTENTION OF THE PARTIES THAT THE CONTRACT DOCUMENTS BE MADE A PART OF THIS AGREEMENT AS IF EACH WERE SET FORTH, VERBATIM IN THIS AGREEMENT.

The terms, provisions, specifications and conditions of RFP No. HR-02-20 and any other documents, conditions, specifications, technical data, drawings, requirements and addenda comprising said RFP shall prevail over any conflicting term, provision, specification or condition in Contractor's Response.

**Separately Executed Contract Documents:** The following contract documents indicated by checkmark below are separately required to be executed by the Contractor as conditions precedent to City's performance obligations under the contract:

☒ Authorized Signature/Contact Information (with W-9)

☒ Addenda Acknowledgement

☐ Bid Security (based on base bid price)

☒ "Conflict of Interest Questionnaire" Chapter 176 of the Texas Local Government Code

☒ Debarment and Suspension Certification



☒ Local Preference Consideration Application & Economic Impact Details

☒ Vendor Compliance with Reciprocity on Non-Resident Vendors

☒ Verification Relating to Prohibited Contracts – Israel

☒ Certification for Contracts, Grants, Loans, and Cooperative Agreements

☒ Certificate of Insurance

☒ Special Insurance Rider

☒ Original of the Texas Ethics Commission Interested Parties Disclosure Form 1295 completed online at [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm), with original submitted to City of San Angelo Purchasing Division.

**Contractor Representations and Warranty:** Contractor represents and warrants to City that it has not employed or retained any person or company employed by City to solicit or secure this Agreement and that it has not offered to pay, paid, or agreed to pay any person any fee, percentage, brokerage fee, or gift of any kind contingent upon or in connection with the award of this Agreement.

**Authority to Execute:** Each of the below named persons executing this contract hereby warrant and represent that he or she is properly authorized to execute the contract for purposes of legally binding the party on whose behalf the contract is executed.





**IN WITNESS WHEREOF**, the parties hereto have caused this instrument to be executed by their respective duly authorized officials the day and year indicated below.

**CONTRACTOR:**

\_\_\_\_\_

BY: \_\_\_\_\_  
(Name and office held)

DATE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**CITY OF SAN ANGELO:**

By: \_\_\_\_\_  
Daniel Valenzuela, City Manager

**ATTEST:**

\_\_\_\_\_  
Julia Antilley, City Clerk

DATE: \_\_\_\_\_  
(SEAL)

**City Official Approvals:**

APPROVED AS TO CONTENT:

\_\_\_\_\_  
Nolan A. Sosa, Purchasing Manager

APPROVED AS TO CONTENT:

\_\_\_\_\_  
Bryan Kendrick,  
Director of Human Resources and Risk

APPROVED AS TO RISK:

\_\_\_\_\_  
Charles Hagen, Risk Manager

APPROVED AS TO FORM:

\_\_\_\_\_  
Dan T. Saluri, Deputy City Attorney